

## **Probate Notes for July 3, 2007**

Probate notes are a recommendation as to the outcome of the petition. Unlike tentative rulings, they do not automatically become adopted as the order of the court. If you wish to continue a matter, contact the civil division at (530) 406-6704. If you wish to have your petition preapproved, contact the probate examiner at (530) 406-6718 between the hours of 2 p.m. and 4 p.m.

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**Case: Estate of Reitan**  
**Case No. CV PB 07-103**

The petition fails to fully state, at Item 9, all persons named in the Will.

1. John Bollingberg and Kurt Bollingberg were omitted.
2. The three charities were omitted.
3. The name of the second named executor was omitted.
4. Whether the grandchildren are all adults was not stated.

Proof of service of notice, including notice to the above parties, is not yet filed. If a declaration supplementing petition is filed, and proof of service of notice is filed, it is recommended to grant the petition to administer the estate.

**Case: Estate of Snively**  
**Case No. CV PB 05-193**

It is recommended to approve the first and final account and report of administrator and grant the petition for its settlement, for statutory fees, and for final distribution.

**Case: Probate Conservatorship of Castorena**  
**Case No. CV PB 02-158**

While Petitioner has stated that a mutual fund was purchased during the account period, he has failed to provide a schedule showing the dividends received from the mutual fund. Since the dividends were reinvested, a schedule of purchases should also be prepared (Prob. Code, 2620(a), 1063(b).) A schedule stating the market value of the assets on hand at the end of the account period was not stated. (Prob. Code, 2620(a), 1063(a).) It is recommended that petitioner file separate schedules stating dividends received, purchases, and the market value of assets on hand.

**Case: Probate Conservatorship of Lares**  
**Case No. CV PB 07-51**

The Capacity Declaration is not yet filed.

**Case: In the Matter of the Lares Trust**  
**Case No. CV P2 06-276**

It is recommended to grant the petition for resignation of trustee and for appointment of successor trustee.